The Commonwealth of Kentucky
kynect State-Based Marketplace

Open Enrollment Issue Tracker and Editing Screenshots Quick Reference Guide

Kentucky will transition to a State-Based Marketplace (SBM) called kynect health coverage, beginning with Open Enrollment on November 1, 2021. After the transition, kynect health coverage will offer Individuals, families, and small business owners an integrated eligibility and enrollment system to shop and apply for Qualified Health Plans (QHPs), with coverage effective January 1, 2022.

Introduction

The **Open Enrollment Issue Tracker and Editing Screenshots QRG** is intended to provide instructions on how to complete an Issue Tracker submission for Open Enrollment Plan Year 2022. This document will also demonstrate how to capture proper screenshots through the Snipping Tool application and the keyboard shortcut to ensure the image does not contain Personally Identifiable Information (PII).

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Last Updated: October 18, 2021

1 What is the Open Enrollment Plan Year 2022 Issue Tracker?

The Open Enrollment Plan Year 2022 Issue Tracker collects various types of system issues to assist in quicker escalation to KHBE. Types of issues that may be entered in the tracker include MCO/Issuer website issues, KOG issues, kynect issues, helpdesk issues, system suggestions or enhancements, and other issues. However, this **does not** replace contacting the appropriate helpdesk with issues and getting a ticket number.

Please reference the below resources to contact the appropriate helpdesk:

- **Professional Services Line:** (855) 326-4650

- **Marketplace Call Center:** (800) 318-2596 (For 2021 Marketplace Coverage only)

kynector and Agent Escalation Process		
Helpdesk Issue Escalation	**Check These Materials First**	**I still have questions, who do I contact?**
Self-Service Portal (SSP) Issues		
SSP Issues are typically technical access issues	• kynect training materials on the DMS website: kynect benefits - Cabinet for Health and Family Services • Release Notes • kynector training materials at KHBE.ky.gov	• Call the Professional Services Line: 1-855-326-4650 • For any issue that remains unresolved or requires further escalation, notify KHBE by email KHBE.Program@ky.gov. • KHBE will review and escalate further as appropriate. • When emailing KHBE, kynectors and Agents should include ticket number from PSL, case number, description of issue, and screenshot of issue. No PII can be included in the email.
Department for Medicaid Services (DMS) Issues		
DMS Issues are typically related to eligibility requirements for Residents	• CHFS Policy Manuals on the DCBS website, training manuals on MyPurpose • Training materials in MyPurpose LMS	• For any issue that remains unresolved or requires further escalation, notify KHBE by email KHBE.Program@ky.gov. • KHBE will review and escalate further as appropriate.
Dire Need Issues		
Dire Need issues are those requiring attention within a 24-hour period	• Newsletter page on the KHBE website	• Email kynectdireneed@ky.gov for Dire Need issues. • kynectors should use the subject line "Dire Need" and indicate whether the Dire Need is for a Medicaid, Qualified Health Plan (QHP), or another case. • KHBE determines appropriate response agency for escalation.
KOG Helpdesk		
Contact for KOG account related issues	• Agents Welcome Packet • New kynector Welcome Packet • kynect benefits KOG Quick Reference Guide • Training materials in MyPurpose LMS	• These unresolved issues should be emailed to KOGHelpdesk@ky.gov • When emailing the KOG helpdesk, agents and kynectors should include a brief description and screenshot of the issue. No Personally Identifiable Information (PII) can be included in the email.
All Other Issues		
Always reach out to the appropriate helpdesk. If the issue remains unresolved after reaching out to the helpdesk, it should then be escalated to KHBE.Program@ky.gov.		

1.1 How to Access the Open Enrollment Issue Tracker

The Open Enrollment Issue Tracker can be accessed through the link provided, here. The link can also be found in the Open Enrollment Webinar deck and will be included each week in the Insight Newsletter pdf. The link should only be accessed through these channels and should NOT be shared. The Issue Tracker is intended for use by kynectors, Agents, and Site Support Staff during Open Enrollment Plan Year 2022.

2 How to Complete an Issue Tracker Submission

Follow the steps below to complete an Issue Tracker submission.

1. Select if the Staff Reporting classifies as a **kynector, Agent**, or **Site Support Staff**.

*Which of the following do you classify as?

○ kynector

○ Agent

○ Site Support Staff

2. Enter the Staff Reporting's **First** and **Last Name** and **Email Address,** then select the **radio button** that identifies the Organization.

*Staff Reporting: First Name

Nikki

*Staff Reporting: Last Name

Flash

*Staff Reporting: Email Address

Nikki.Flash@mailinator.com

*Staff Reporting: Organization

○ Community Action Kentucky (CAK)

○ Kentuckiana Regional Planning & Development Agency (KIPDA)

○ Kentucky Primary Care Association (KPCA)

○ Kentucky Health Benefit Exchange (KHBE)

○ Kentucky Equal Justice Center

○ Family Health Centers

○ Kentucky Voices for Health (KVH)

○ Insurance Agency/Organization

○ Other

Please note: Agents should select **Insurance Agency/Organization** and enter their **Agency/Organization** in the open field that displays**.** In all other cases, if the Organization is not listed select **Other** and enter the **Organization** in the open field that displays.

3. Enter the **Date of the Issue** and click **Next**.

| *Date of issue: |
| 10/11/2021 |

Next

4. Select the **radio button** that identifies the system affected.

*Which system does the issue affect?

○ kynect (kynect benefits or kynect health coverage)
○ Managed Care Organization/Issuer website, please specify:
○ Kentucky Online Gateway (KOG)
○ Report issue with helpdesk
○ I want to give an enhancement suggestion
○ Agent Dashboard
○ Other

Please note: The **Agent Dashboard** option will only display if the user selects **Agent** to the question "Which of the following do you classify as?"

Please note: The selection made to the question "Which system does the issue affect?" will automatically trigger new information fields. Please complete the new required fields.

5. Select **which program you were applying for** (if applicable).

Which program were you applying for?
○ Medicaid/Financial Assistance
○ Qualified Health Plan (QHP)
○ Small Business Health Options Plan (SHOP)
○ Supplemental Nutrition Assistance Program (SNAP)
○ Child Care Assistance Program (CCAP)

6. Enter the **Case Number or Application ID.** If the case number or application ID is not provided, the issue cannot be triaged. If it is an issue that occurs before a case number or application ID is received, please put "N/A".

7. Select **if this issue has been reported to the Professional Services Line or appropriate helpdesk.**

Please note: Completing an Issue Tracker submission **does not** replace contacting the appropriate helpdesk with issues and getting a ticket number. If you are not provided with a ticket number, please ask for one. Please reference the Escalation Process Chart for more information.

8. If **Yes** is selected, the tracker will trigger the question, "If sent to your Professional Services Line, do you have a ticker number?"

   a. Enter the **ticket number** in the field that displays if there is a ticket number for the issue.

> b. Select **the reason a ticket number was not provided** if there is no ticket number for the issue.

*If sent to your Professional Services Line, do you have a ticket number?

○ Yes. If you have the ticket number enter here:

● No

○ I don't have ticket number/not sure of ticket number

Since you were not provided a ticket number, why not?

● Helpdesk would not provide/failed to provide

○ I did not ask or forgot to ask for a ticket number

○ I don't have the number available at the moment, but did receive

○ Helpdesk transferred me to another party such as DCBS

○ Other, please specify:

9. Select **the primary category of the issue**.

*What is the primary category of the issue?

○ Kentucky Online Gateway (KOG)

○ No Access to kynect - *Please specify who does not have access in the description below*

● Application Intake

○ Issue with Enrollment Manager (unable to browse for plans, not redirecting me to correct website)

○ Case Association

○ Error Message Received

○ Slowness/Performance Issue

○ Document Upload

○ Incorrect Next Steps

○ Feature Not Enabled (greyed out)

○ Correspondence/Notices

○ Dashboard (Message Center, To Do's, etc.)

○ Report a Change

○ Training Materials (QRG, Online Help, etc.)

○ Grammar or language issue

○ General eligibility issue

○ MA eligibility issue

○ QHP eligibility issue

○ Payment Assistance eligibility issue

○ Agent Dashboard

○ Other

> **Please note:** The **Agent Dashboard** option will only display if the user selects **Agent** to the question "Which of the following do you classify as?"

10. Select the **browser the issue was occurring in** and the **type of device the issue is occurring on.**

*Which browser was the issue occurring in?
- ○ Internet Explorer
- ○ Microsoft Edge
- ● Google Chrome
- ○ Mozilla Firefox
- ○ Multiple Browsers
- ○ Other

What type of device is the issue occurring on?
- ● Laptop
- ○ Desktop
- ○ Smart Phone
- ○ Tablet
- ○ Other
- ○ I'm not sure

11. Select **around what time (EST) the issue occurred.**

Around what time (EST) did the issue occur?
- ○ Before 8:00 AM
- ○ 8:00 AM- 9:00 AM
- ○ 9:00 AM-10:00 AM
- ● 10:00 AM-11:00 AM
- ○ 11:00 AM- 12:00 PM
- ○ 12:00 PM- 1:00 PM
- ○ 1:00 PM- 2:00 PM
- ○ 2:00 PM - 3:00PM
- ○ 3:00 PM- 4:00 PM
- ○ 4:00 PM-5:00 PM
- ○ 5:00 PM- 6:00 PM
- ○ After 6:00 PM

12. Provide a detailed **description of the issue**.

*Describe the issue

Receiving an error when requesting access to a client's case

Please note: When describing the issue, it is important to provide as much detail as necessary such as the screen that the issue is occurring on. Please make sure **no** Personally Identifiable Information (PII) is included in the response.

13. Select **if the issue was able to be resolved** and provide any additional comments/enhancements suggestions.

*Were you or the Resident able to resolve the issue?

○ Yes, by switching to another browser
○ Yes, by refreshing screen
○ Yes, by clearing the cache
○ Yes, Other
● No

Additional comments/Enhancement Suggestions:

14. Select **Yes** or **No** to "Do you have a screenshot of the issue?"

Do you have a screenshot of the issue?

● Yes
○ No

Please note: Screenshots can only be added to the Issue Tracker for MCO, kynect, and helpdesk issues that were not resolved. The option to attach an image only displays if one of these issue types is selected on the Issue Tracker.

Please note: Any Personally Identifiable Information (PII) **must be removed** before submitting a screenshot of the issue. Please refer to Section 3 for detailed instructions on how capture a proper screenshot.

15. Read the instructions for examples of PII and click **Select Image**.

16. Select the image, then click **Open** to upload the screenshot to the tracker.
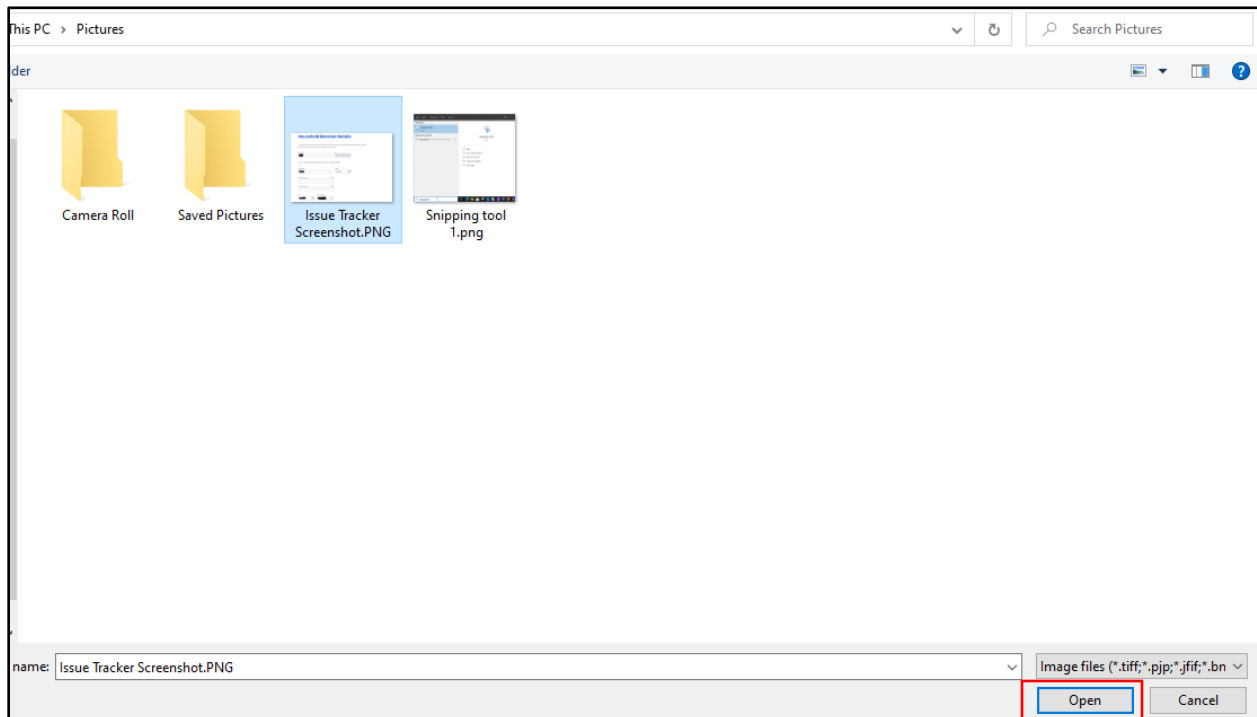
17. The screenshot title now displays in the tracker.

18. In order to complete an Issue Tracker submission, kynectors and Agents must attest that they have completed the below trainings. Trainings may be accessed through KHBE's Learning Management System, MyPurpose. If one or both have not been completed, please do so before completing the Issue Tracker submission.

    a. kynectors must click the **check box** to confirm they have completed the Privacy & Security Training and Open Enrollment Webinar.

b. Agents must click the **check box** to confirm they have completed the Privacy & Security Training and watched the Issue Tracker Demonstration on LMS or during Agent Office Hours.

*In order to complete an Issue Tracker submission, you must attest that you have completed the Privacy and Security Module within the SBM Registration/Certification Training and watched the Issue Tracker Demonstration featured in the Agent Office Hours. Both may be accessed through KHBE's Learning Management System, MyPurpose. Please check the boxes below to indicate that you have completed both trainings, and to complete your Issue Tracker submission.

☑ *I confirm that I have completed the Privacy & Security Training and watched the Issue Tracker Demonstration on LMS or during Agent Office Hours.

19. Click the **check box** to confirm that no PII is included in this Issue Tracker submission.

☑ *I confirm that no PII is included in this Issue Tracker submission.

20. Provide an e-signature confirming no PII is included in this Issue Tracker submission and all information is accurate, then click **Next**.

*Please provide an e-signature confirming no PII is included in this Issue Tracker submission and all information is accurate.

Nikki Flash

Next

21. The Issue Tracker submission is complete! Someone will follow up once a resolution is received.

3   Capturing Screenshots and Removing Personally Identifiable Information (PII)

It is important to add a screenshot to an Issue Tracker submission, when applicable, to help KHBE and the functional team triage the issue and provide a resolution as quickly as possible. When uploading these screenshots, all users **must** ensure that Personally Identifiable Information (PII) is removed from the image.

Examples of PII include:
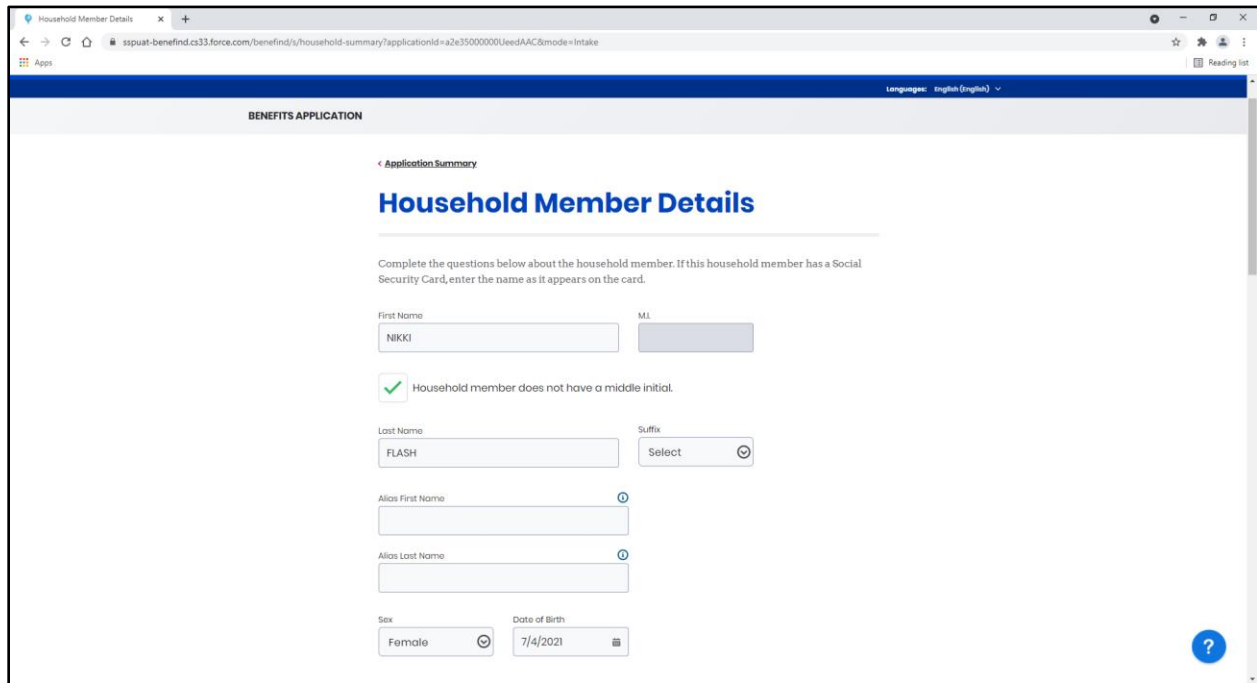
- First and last name
- Date and place of birth
- Telephone number
- Address
- Mother's maiden name
- Social Security number
- Driver's license number
- Email address
- Biometric records or identifiers
- Medical, educational, financial, and/or employment information

The following sections demonstrate how to capture a proper screenshot in the Snipping Tool application or with the keyboard shortcut and how to remove PII that may be in the image.

3.1   How to Capture a Screenshot and Remove PII with Snipping Tool

Follow the steps below to capture a screenshot and remove PII using the Snipping Tool application.

1. Navigate to the screen where the issue is occurring.

2. Enter **Snipping Tool** in the search bar on the bottom left corner of your home screen, then select **Snipping Tool** from the results.
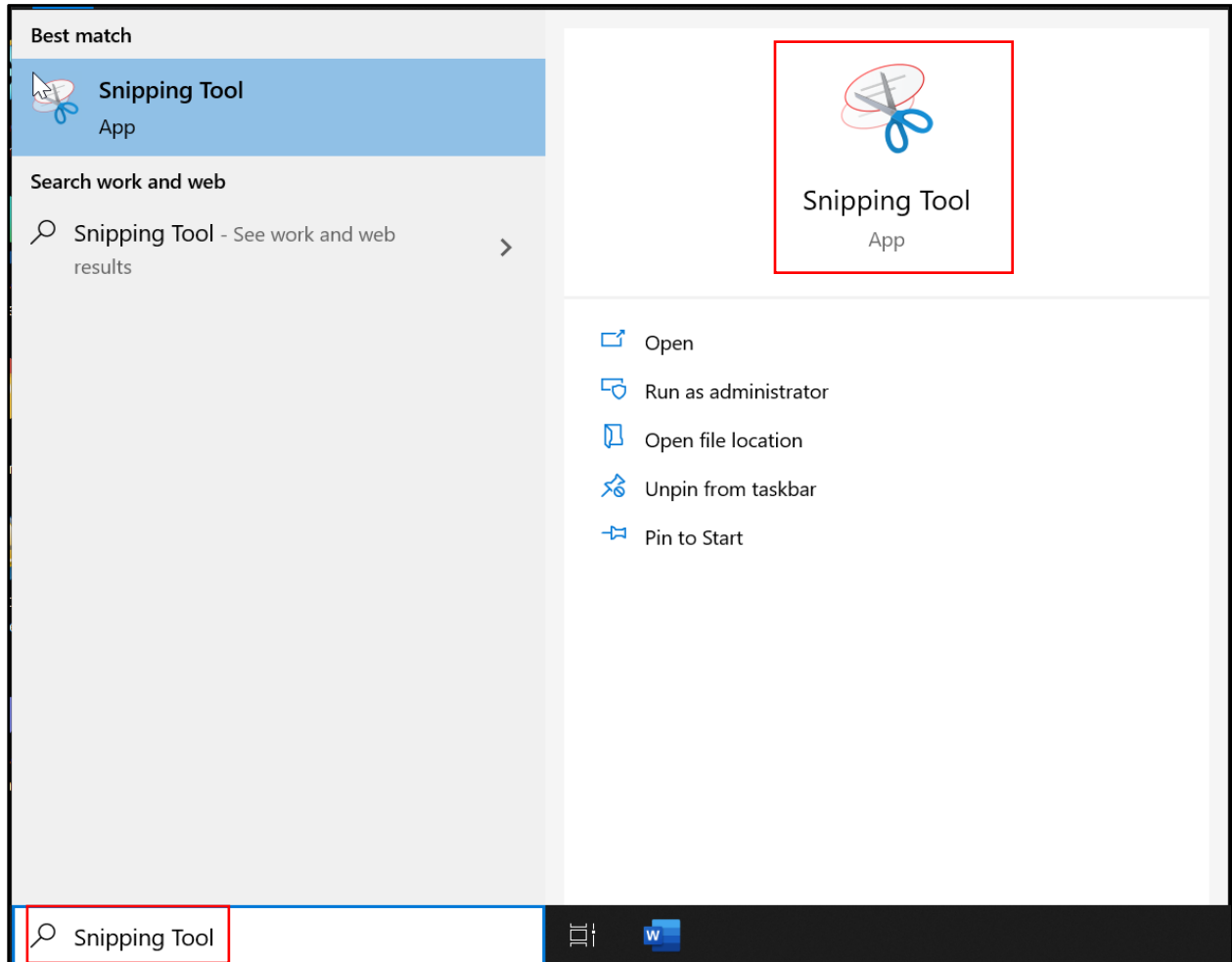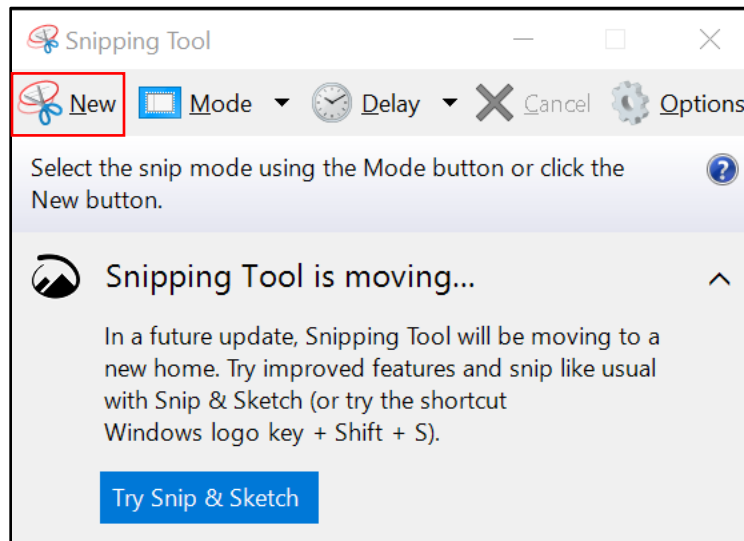

3. The Snipping Tool application will open, click **Mode** to select the type of snip.
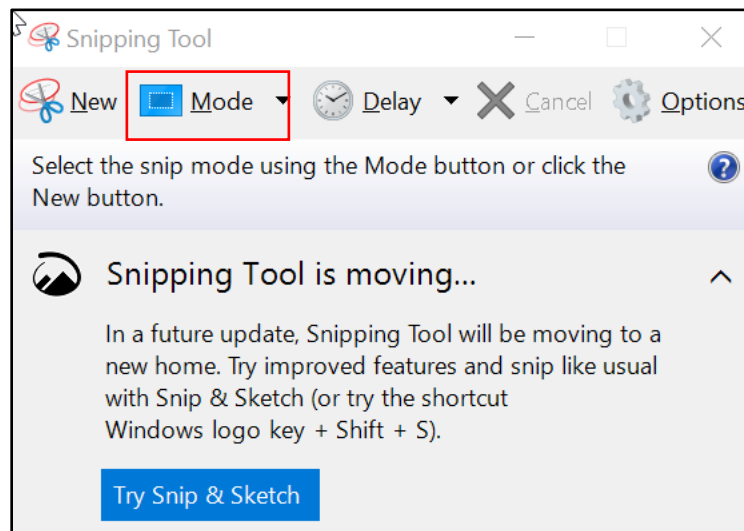
4. From the **Mode** tab, select the type of snip from the following options:

   a. **Free-form Snip:** Draw a free-form shape around an object.

   b. **Rectangular Snip:** Drag the cursor around an object to form a rectangle.

   c. **Window Snip:** Select a window, such as a dialog box that you want to capture.

   d. **Full-screen Snip:** Capture the entire screen.
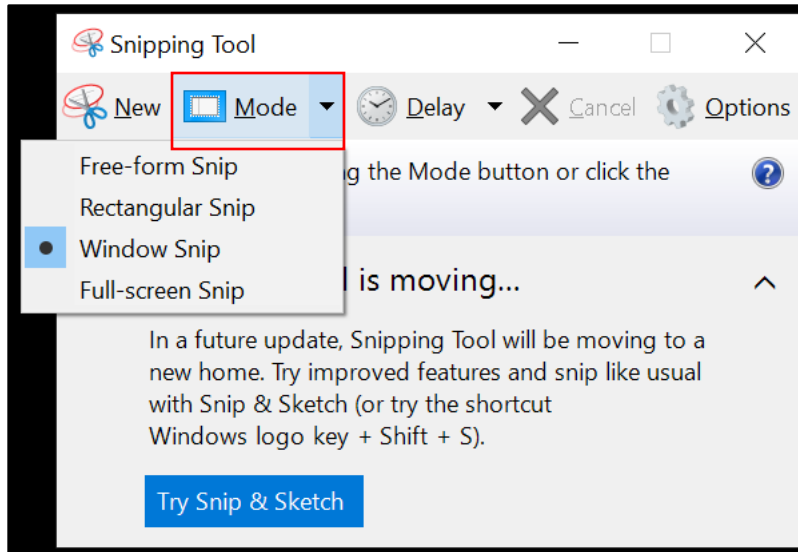
5. Once the preferred type of snip is selected, click **New** to capture your screenshot.

6. Once the screenshot is captured, the image will display in the Snipping Tool application.


7. After reviewing that the image contains the information needed, check for Personally Identifiable Information (PII) that must be removed.

8. If there is PII identified, click the **Pen Icon**. This is what will be used to cover any PII.
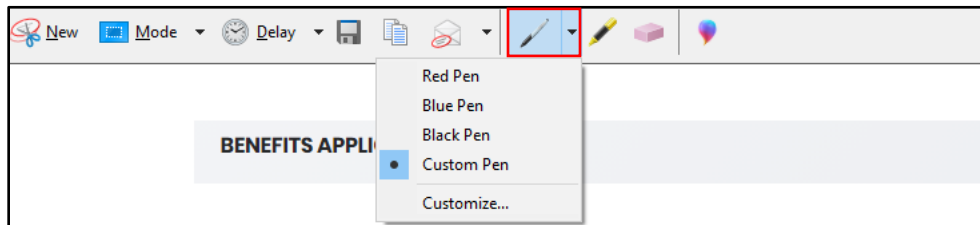

9. Click **Customize…** to edit the type of pen.
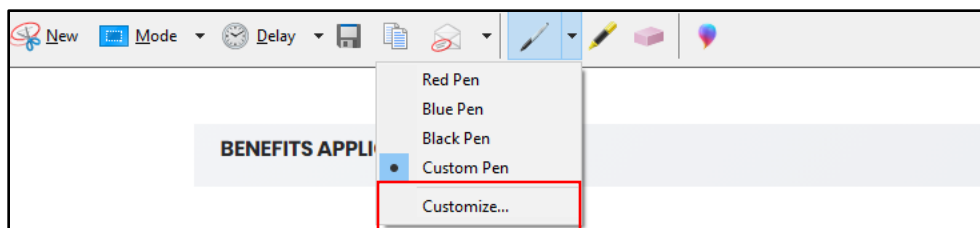
10. By clicking **Customize…**, there are options to edit the color, thickness, and tip of the pen. It is recommended to use **Black** for Color, **Thick point pen** for Thickness, and **Chisel tip pen** for Tip. Click **OK** to continue.
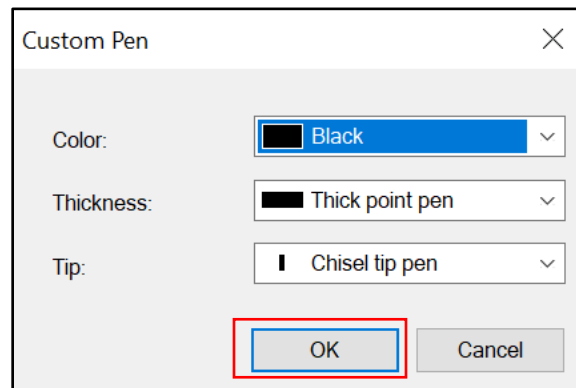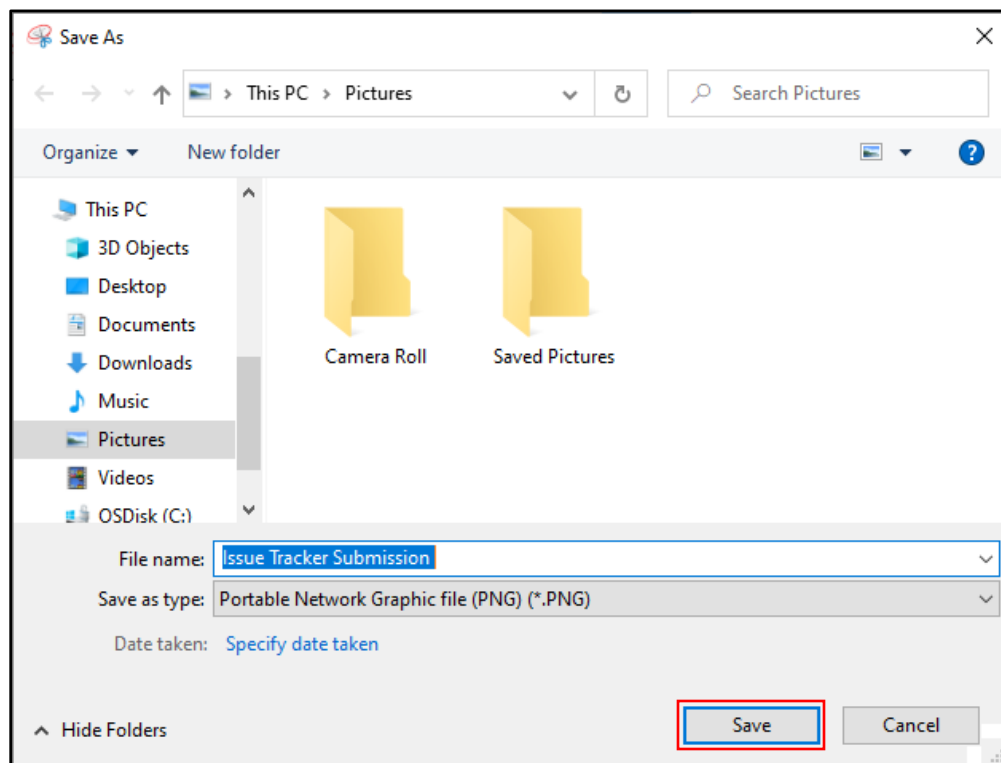

11. Hold the cursor down and drag it over the text that needs to be covered. Do this until all PII is covered, but do not cover non-PII when possible.

12. Navigate to the file button in the top left corner and select **Save As**.
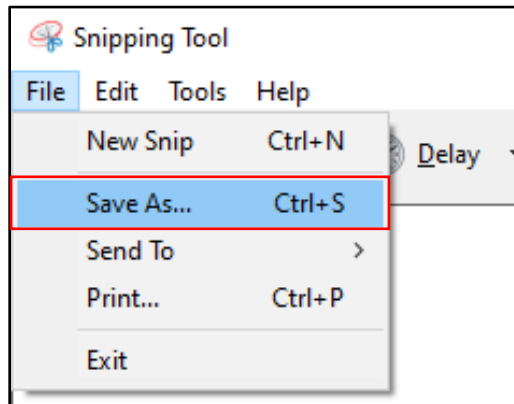
13. Make sure the image is a .jpg, .jpeg, .png or .tiff and then save the image to an appropriate folder. Click **Save** once you are ready to save the screenshot.

Please note: The document file name can be updated to be more relevant, but there is no formal naming convention that is required. Please ensure there is no PII included within the file name.

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14. The screenshot is now saved to the folder and is ready to be uploaded to the Issue Tracker.

3.2 How to Capture a Screenshot and Remove PII with Keyboard Shortcut

If the Snipping Tool application is unavailable, follow the below steps to take a screenshot using the Print Screen keyboard shortcut.

1. Navigate to the screen where the issue is occurring.

2. Depending on the device, click the **Windows Logo Key + PrtScn button** as a shortcut for the print screen. If the device does not have the PrtScn button, you may use **Fn + Windows logo key + Space Bar** to take a screenshot.

3. To locate the screenshots, open **File Explorer** from the taskbar. On the side navigation pane, select the **Pictures** folder, and select **Screenshots.**
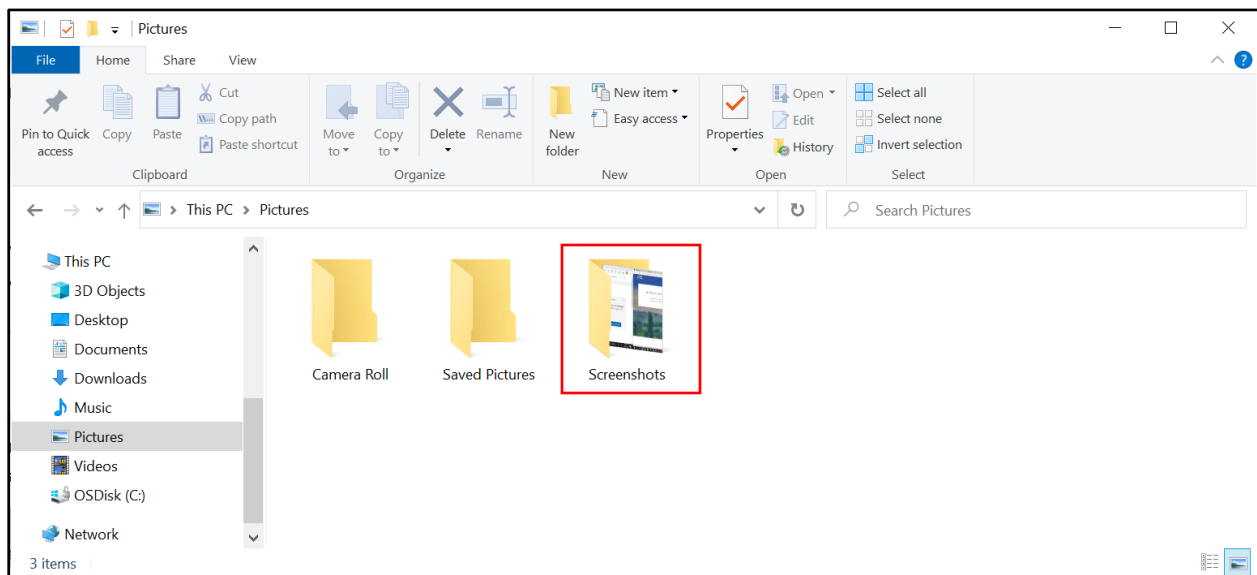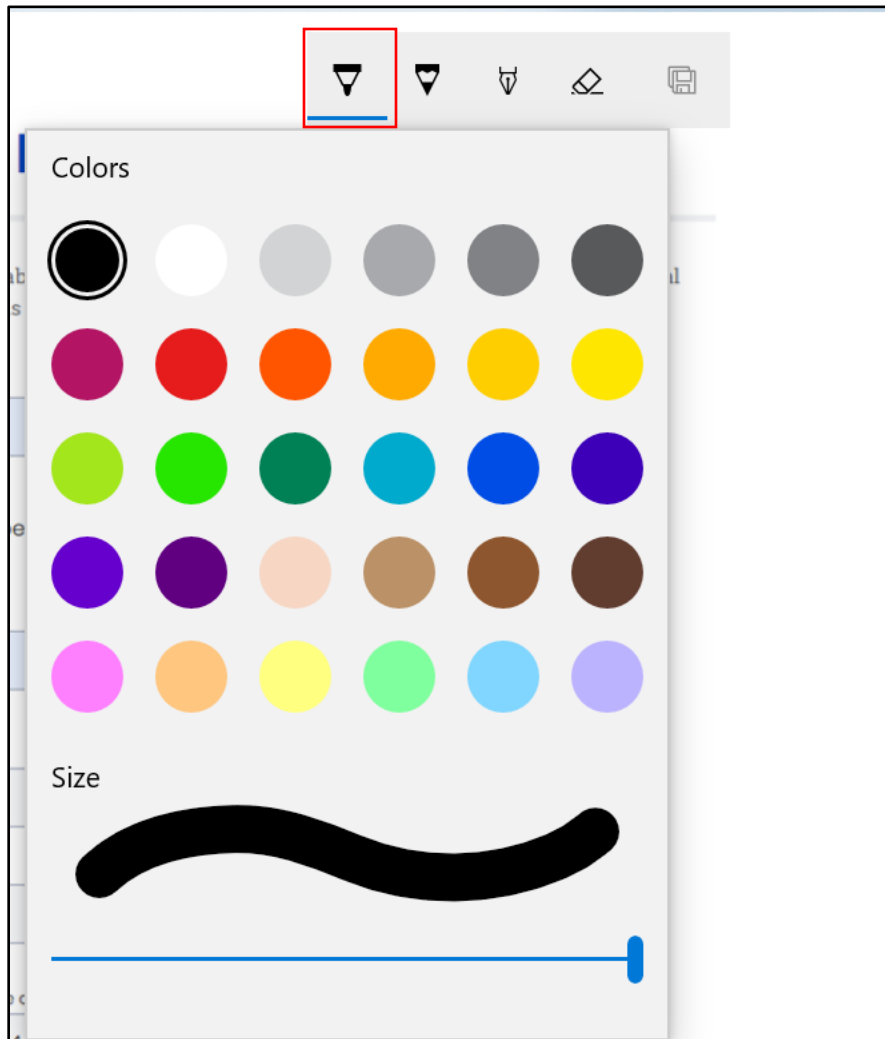
4. In the Screenshots folder, select the image you want to use.
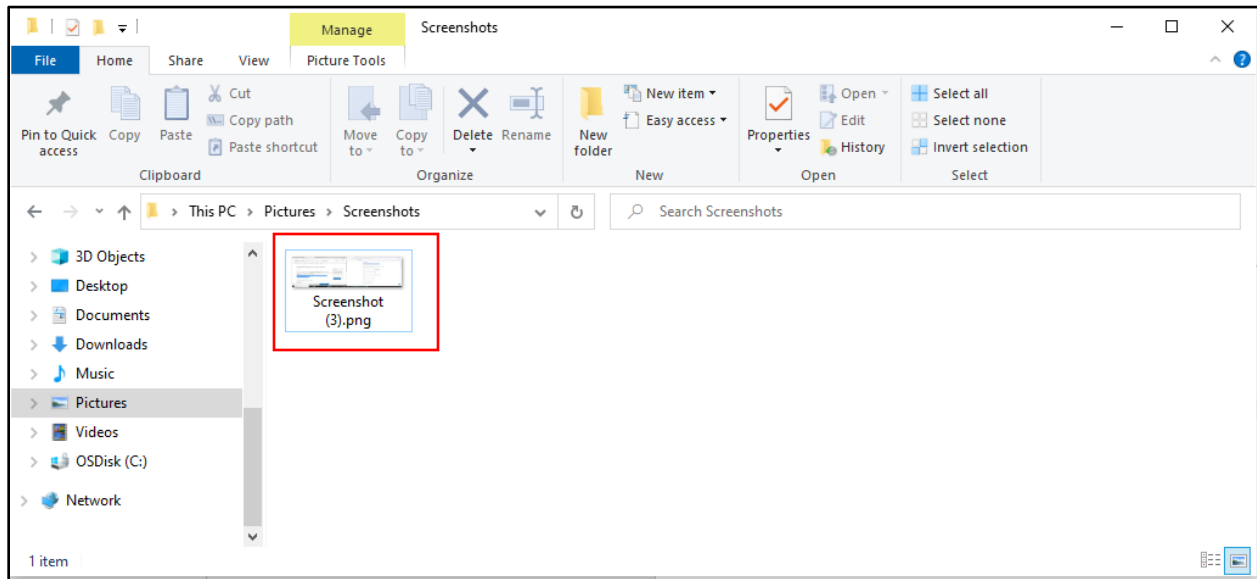
5. After reviewing that the image contains the information needed, proceed to check for Personally Identifiable Information (PII) that must be removed.

6. With the PII identified, click the **Pencil and Paint Brush Icon** then click **Draw** to edit the screenshot. This is what will be used to cover any PII.
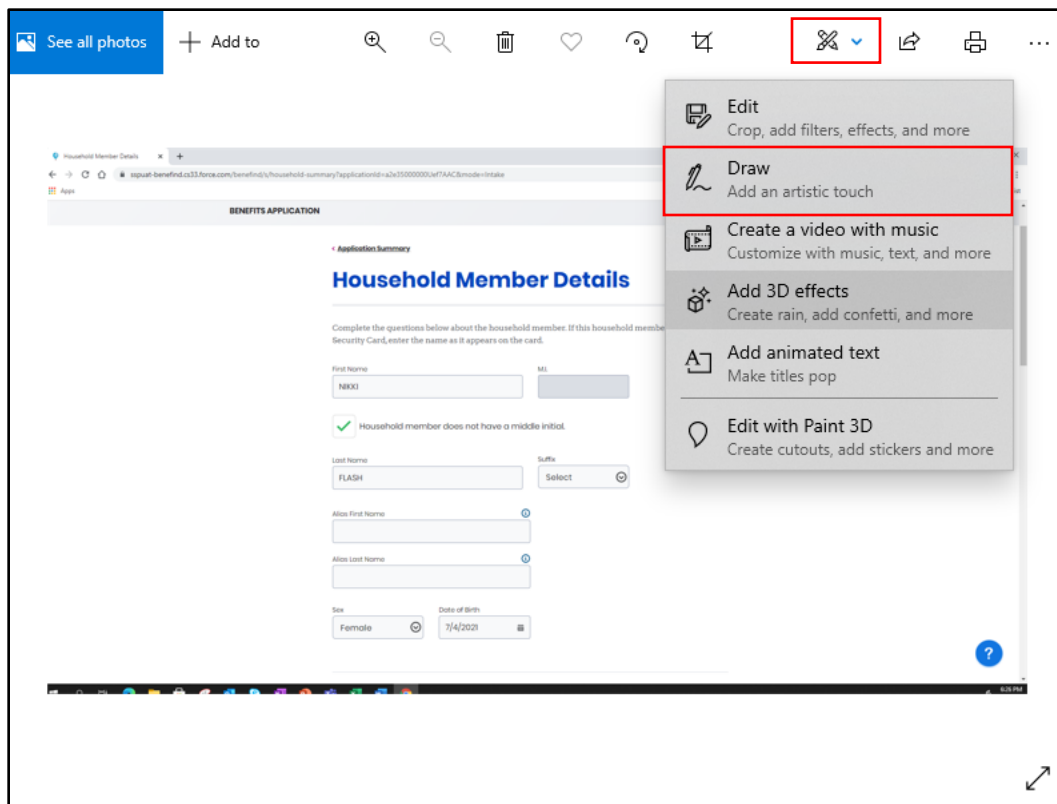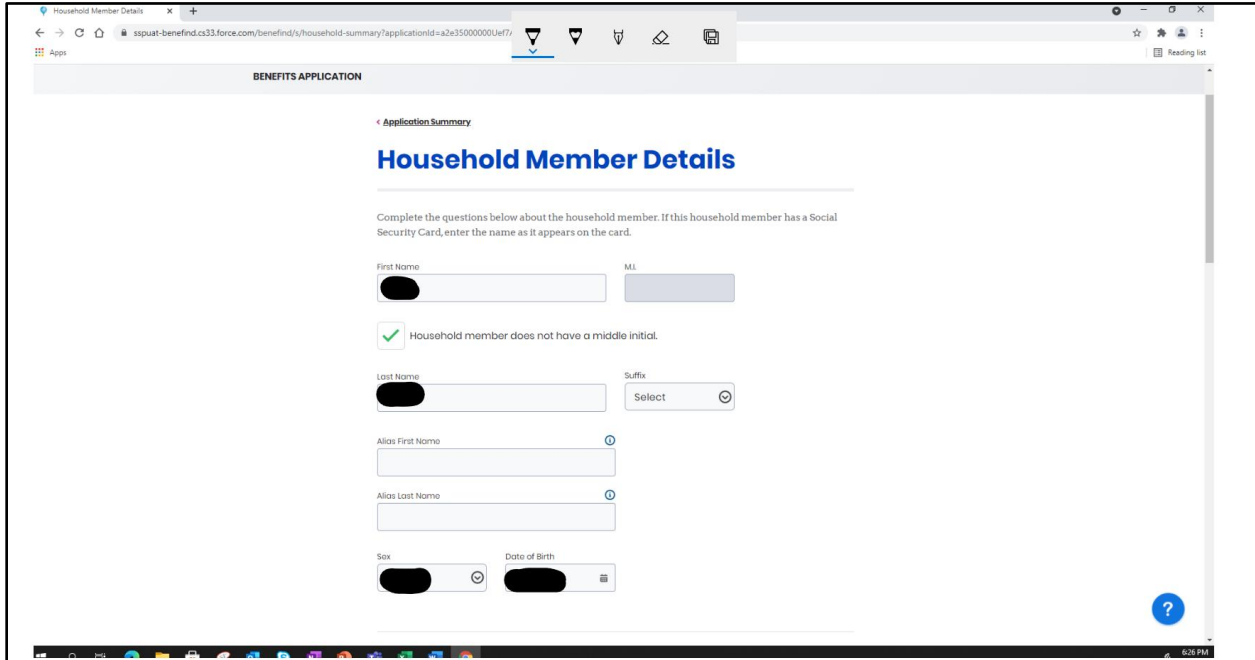
7. Navigate to the top center of the image and click the **Pen Icon** to edit the Color and Size of the pen. It is recommended to use **Black** for the color and move the scale to the **far right** for the largest size.
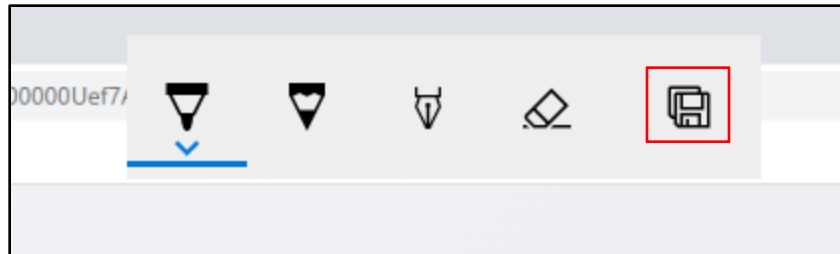
8. Hold the cursor down and drag it over the text that needs to be covered. Do this until all PII is covered, but do not cover non-PII when possible.

9. Navigate to the top center of the image and click the **Save Icon**. The edited screenshot will automatically save in the Screenshots folder. Make sure the image is a .jpg, .jpeg, .png or .tiff file.

10. The new image that the PII has been removed from will display in the Screenshots folder.
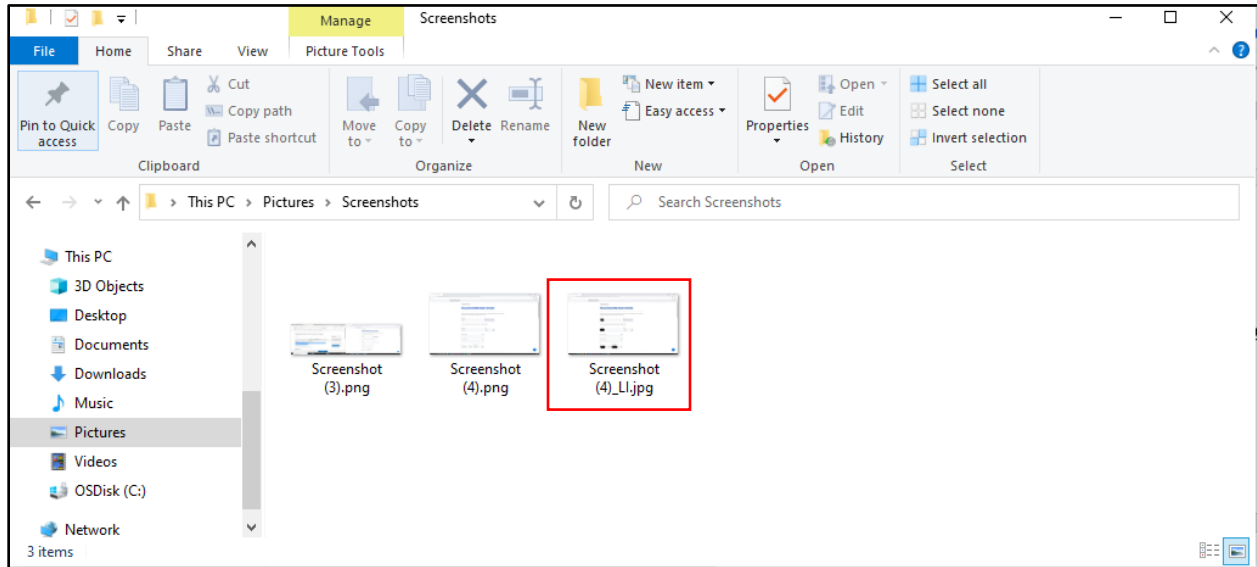
Please note: The document file name can be updated to be more relevant, but there is no formal naming convention that is required. Please ensure there is no PII included within the file name.

11. The screenshot is now saved to the folder and is ready to be uploaded to the Issue Tracker.